

Release Notes for VIC CRM - release 20071206

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Revisions

This is a baseline release prior to updating functionality in Projects and Sales this Fall. Don't expect too many revisions; mostly it's just some bug fixes (some of which I didn't really track well... sorry). The functionality changes include:

1. The Projects database is now functional. It's not complete, but is useable.
2. The Sales database now tracks multiple payments per Invoice.
3. Dashboards have been added to the new VIC Launch database. Sample dashboards include a new financials dashboard with frames for billable journal entries; sales orders; unsent invoices; and sent invoices.
4. The administrator can select Logos. These are configurable on the Global Preferences page.

This list may not be exhaustive. I make tweaks and minor bug fixes all the time, and can't be sure I've recorded them all.

Prerequisites

This should hardly have to be said, but I *have* been asked:

- If you're running VIC CRM for yourself alone, you do not need to install it on a server. All you need is a PC capable of running Lotus Notes R6.5 or greater. And obviously you'll need the Notes client. I have *not* tested this under Linux, so if you do run it there, I'd like to hear about it. My guess is that your ability to embed COM objects into your documents will be diminished, as will your ability to use the Phone Dialer, but that's about it.
- If you're running VIC CRM for shared use, you're going to need to put it on a Lotus Domino server. That means one server and one copy of Lotus Notes R6.5 (or better) per user.
- Any other prerequisites are determined by Lotus Notes and/or Domino.

First-time Installation Instructions

Server or single user

There is no setup program for VIC CRM. The installation instructions vary only slightly whether this is to be installed for shared use on a Domino server or for individual use on a PC. I'm going to describe

the setup as I personally perform it. You might change directories or other specifics, but that's your prerogative.

1. Copy the templates to a \VIC Templates directory under your Notes data directory. If it doesn't exist, create it. If this is going to be a shared installation, then of course you'll do this on your Domino server. (On my workstation it's *d:\lotus\notes\data\VIC Templates*.)
2. Create a directory for the VIC databases. This is \VIC under your data directory. (On my workstation it's *d:\lotus\notes\data\VIC*.)
3. For each template, create a new database in the VIC directory. As each database is opened, it may complain that you haven't set up VIC yet. Don't worry about that yet, just get the databases created. Do this in this order: *Launch, Config, Index, Journal, Library, Contracts, Project, Sales, Notebook*. The Notebook requires some special handling; I'll describe that below
4. For each database you created (*especially if you're on the server!*) EDIT THE ACCESS CONTROL LIST.
5. Now open the VIC Config database and go to the Local tab of the Navigator pane. You're going to edit all of the settings on this tab, starting with the Global Profile at the top.
 1. Select **Global Profile** and edit the entries there. When you save the Global Profile it will be copied to all of the other databases (which is why you needed to open them first, and why you really want to get the installation paths right:
 1. **Installation Paths:** If you installed VIC where I suggested, then these values should be OK. If not, then you'll have to adjust them. The "Locate" hotspots at the right of the Global Profile document should assist you nicely. DO NOT check the "Installed" checkboxes next to Products or Services. We don't (yet) have separate Products or Services databases, but use the Library instead. If you want to create them and donate them to the project, have at it, though.
 2. **Server Scheduled Agents:** At the moment there's only one... auto-import Email. Mine's not enabled. (I'd just as soon press the "Import" button myself when in the mail views.)
 3. **Contracts Options:** These have rather verbose explanations, so I won't bother with them here. Just set them to match your organization's preferences.
 4. **Logos.** Select a Logo document. If you like, configure your own logo. For best results your logo should be 130 pixels wide by 78 high.
 2. Now select **Letterheads** (in the Navigator pane, naturally). Edit the default letterhead to whatever's appropriate for you. You can insert pictures if you like. Just keep in mind that the formatting of the default example uses a table. Sometimes it's useful to make the table visible, then make it invisible again when you've got things the way you like. You can have as many different letterheads as you like.
 3. Now edit the **System Variables**. These should be self explanatory. A couple that aren't... Don't expect "ArchiveDBPath" to work yet... it's for future use.
 4. Now select **User Preferences** and edit the default user preferences. You'll need to chug through all of the tabs to see that the defaults are to your liking.
 5. You won't need to edit anything in **Agent Logs**. This is where information about agents (particularly errors) are stored. If, for instance, you call for service and didn't pay attention to what an error message actually said, you can look it up here. You can also see how often it occurs, and who it affects.

6. If you're installing to your workstation as a single user, you just want to pull down the Create menu on the Notes menubar, then select UserPreference and set up your personal preferences (you don't really have to, since the defaults you've already set will do you nicely as a single user). You're done.
7. If this is a network installation you're done editing preferences for the moment. You'll want to stop at this point, then install to each workstation.
 1. Just make a VIC directory under the Data directory on the workstation, then make a replica of each server database (in the same order listed above) into that directory.
 2. Then on the workstation (logged in as the primary user), open the Config database, go to the Local tab and then User Preferences. Pull down the Create menu (on the Notes menubar) and select UserPreference. Set up specific preferences for this user.

Special Instructions for the Notebook

The Notebook is always, always, always to be located on the local workstation. Unlike the rest of the VIC database, the Notebook is designed and intended NOT to be shared. Rather, it's intended to be a temporary scratchpad for information that you're going to properly file later. However, my use isn't necessarily your use, so you might find some other creative ways to use it. Keep this in mind.

1. When you're installing VIC on the server, you're going to get an error regarding the Notebook if you don't make a local copy of the Notebook. Put it on your local machine in the same path (relative to the Notes data directory) that you're using on the server.
2. It's a COPY you should be making, NOT A REPLICA.
3. If you have multiple users logging into the same machine they'll be using the same Notebook. Keep that in mind for privacy reasons. If this is your situation, and the privacy is a concern, then it can be fixed as follows:
 1. add an Authors field to the default document, and put the @Author as the default value.
 2. In the Advanced tab of the Notebook's Access Control List dialog, check "Enforce a consistent Access Control List across all replicas". Then only the author will be able to see the docs that he's created.
 3. Keep in mind that, if you have people leaving the company, then you won't be able to see or clear their documents unless you've also added some superuser name to allow you back-door access to these docs. Balance reasonable security, privacy, and management concerns. Employees should know that there is NO expectation of privacy on a company-owned machine.
4. Be very careful about WHERE the Notebook copy is going. The path is relative to the Data directory of your Notes installation. That's determined by your NOTES.INI file, and it's different for different versions of Notes. Be especially careful if you've installed Notes 8... IBM's changed the path.

Upgrade Instructions

MAKE A BACKUP!

REHEARSE THE UPGRADE IN A TEST ENVIRONMENT!

From 20061118:

This version has one additional database: VIC_Launch.nsf. Just create it from the template and/or make appropriate replicas as if you were newly installing that database (which you are).

Then just update the design of all of the databases from the provided templates.

Then you want to read down to the “Automatically Starting VIC” section, as those instructions have changed.

From earlier versions:

If you're upgrading from an earlier version (one with the Opportunities database) this can be a tricky upgrade, and I won't pretend it isn't. Frankly, changing the name of “Opportunities” to “Projects” is something that just needed to be done, and I wanted to do it before the old inappropriate name got too entrenched. VIC CRM is useful for far more than sales, so it makes little sense to limit the terminology to sales-related verbiage. Working an opportunity *is* a project, sure. But there are many other projects we could be tracking with VIC. For instance, you could actually track a job you're doing for a customer. And tracking your tasks better means you can bill better, and better justify your billing. When we start implementing tasks in earnest I plan to have the tasks linked to the Notes calendar as To-Dos. Those abilities will start to shape up in upcoming releases.

If you have a lot of people using Opportunities (and I doubt you do, as sketchy as that database is), then you'll have some renaming of existing databases to do. The new name is vic_projects.nsf. If you're going to rename these databases instead of simply replacing them, then you'll also need to go to the Design tab of the database properties dialog and change the name of the template. The new default name is “CratchitCRMProjects”. (Some of you admins change the name of the template every upgrade, and I applaud you for that. That way you can't get accidentally hosed.)

Other than that, the easiest thing to do is to copy in the new templates, then for each database use *Replace Design*. (For new Notes users: open the Workspace, right-click the database, select “Database”, then “Replace Design”. This will probably be easier for most people than “Refresh Design”. If you've made your own mods, you're not “most people” and don't need me to tell you how to upgrade anyway.)

Once you've done that then you'll have to go back to the Global Profile document in the VIC Config database and use the Locate hotspot to set the new location/name of the Projects database.

The most important thing is that you'll need to replace all the fieldmap documents in the VIC Config database with those that are distributed in the VIC Config template. There are a good number of new fieldmaps and modifications to existing ones. For instance, all of the “Opportunity” fieldmaps are obsolete, and must be replaced with “Project” fieldmaps. The new fieldmaps This will enable such new functionality as the ability to import a Lotus Notes Addressbook. The fieldmaps are only used for relating new documents. You can delete the old ones and replace them with new ones without fear of “pulling the rug out from under you.”

Automatically starting VIC

An optional installation step is to set up your “My Activities” page as the default welcome page for Notes. To do this,

1. Open your Workspace.
2. Drag the VIC Launch icon to your bookmark bar.

3. Right-click the new bookmark and click “Set Bookmark as Home Page”.

Important Note: If you're going to use the My Activities page as your welcome page, then I strongly suggest you use the new GoVIC launcher to start Lotus Notes (described below).

The GoVIC Launcher

VIC does have an Achilles Heel that is solved by the use of this tiny launcher program.

The problem: If your computer crashes (or if Notes crashes) while VIC is operational, then the next time you run VIC you won't be able to access the My Activities page.

The reason: *Mea culpa.* In order to prevent multiple copies of the My Activities page from running, I use a global environment variable to see if it's already displayed. Environment variables get written to Notes.ini, so if it's not cleaned up, then the next time you run VIC it thinks it's already running.

This may not have been the best design choice on my part, but at the moment it's the only way I know of to get the behavior even close to what I want. A better solution would be for Notes to provide some method by which I could tell what tabs are active and bring any particular one to the fore. Nevertheless, I don't have that solution available, and poor or not, I've made the design choice.

The solution (1): The addition of the VIC Launch database should prevent this in most cases; however, I can't guard against a crash. So...

The solution (2): A really tiny little program that simply scans the Notes.ini file and removes the environment variable prior to just running Notes.exe. Just put GoVIC.exe in the same directory as Notes.exe and run it there instead of running Notes.exe. That's all.

To clear the problem manually, you have two choices:

1. Prior to re-starting Notes, edit Notes.ini in a text editor. Remove the line, “\$CratchitWelcomeOpened=1”
It will probably be at the bottom of the file.
2. Re-start Notes. Instead of the My Activities page, you'll get the default Notes welcome page after a lengthy delay. Open VIC Config, or just select it on the Workspace, and then select Actions from the Notes menubar, then “Reset 'My Activities' Flag”. Then re-start Notes.

Now, isn't it easier to simply run “GoVIC.exe”?

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